

# Department of Revenue

## Agency Performance Dashboard

Q2 FY2018

### Goal Met Key

✓ goal met, ✗ goal not met, ☰ goal in progress. As determined by comparison of current data and target.

### Trend Key

↑ trending in favorable direction, ↔ trend is holding, ↓ trending in unfavorable direction.

## Economic Development

Percentage change in Lottery funds distributed for property tax relief from prior year

### Metric Definition

Lottery funds available for property tax relief is certified in October of each year to reduce property tax bills for Wisconsin homeowners in December. The Lottery and Gaming Credit is paid to local governments on the fourth Monday in March.

Goal Met	Current	Previous	Target	Trend
✗	7.1% decrease	14.97% increase	1% Increase	↓

**Reporting Cycle:** Annual (state fiscal year July 1, 2016 - June 30, 2017) Reported in October 2017.

**Additional Details:** \$172,129,400 was certified for fiscal year 2017. \$185,311,200 was certified for fiscal year 2016. \$161,428,600 was certified for fiscal year 2015.

## Reform and Innovation

Fraudulent returns stopped and incorrect refunds or credits reduced or denied

### Metric Definition

The department uses analytics to detect and prevent fraudulent returns or credits. Corrections to amount claimed for Earned Income Tax Credit and Homestead Credit are included.

Goal Met	Current	Previous	Target	Trend
✗	\$9.4 million	\$6.8 million	\$47.2 million	↑

**Reporting Cycle:** Quarterly (October 1, 2017 - December 31, 2017)

**Additional Details:** Current reporting period is actual results for Quarter 2 of fiscal year 2018; fiscal year 2017 result is \$57.3 million. Previous reporting period is actual results for Quarter 1 of fiscal year 2018. Target is annual legislative goal for fiscal year 2018. The majority of the activity is during the individual income tax processing season starting in January.

Percentage of individual income tax returns received electronically

**Metric Definition**

Percentage of individual income tax returns received electronically.

Goal Met	Current	Previous	Target	Trend
✗	85%	85%	87%	↔

**Reporting Cycle:** Annual (tax processing year)

**Additional Details:** Current reporting period is for tax year 2016 returns (reported in July 2017). Previous reporting period is actual results for tax year 2015 returns. Target is for tax year 2016 returns.

Percentage of sales and use tax returns received electronically

**Metric Definition**

Percentage of sales and use tax returns received electronically.

Goal Met	Current	Previous	Target	Trend
✗	94%	94%	95%	↔

**Reporting Cycle:** Annual (tax processing year)

**Additional Details:** Current reporting period is for tax year 2016 returns (reported in July 2017). Previous reporting period is actual results for tax year 2015 returns. Target is for tax year 2016 returns.

## Efficient and Effective Services

Delinquent tax collections

**Metric Definition**

The department considers a tax "delinquent" when the due date of an assessment has passed and any statutory appeal rights have expired. Once delinquent, the debt is subject to collection action.

Goal Met	Current	Previous	Target	Trend
✗	\$64.3 million	\$60.7 million	\$227.02 million	↑

**Reporting Cycle:** Quarterly (October 1, 2017 - December 31, 2017)

**Additional Details:** Current reporting period is actual results for Quarter 2 of fiscal year 2018; fiscal year 2017 result is \$279.8 million. Previous reporting period is actual results for Quarter 1 of fiscal year 2018. Target is annual legislative goal for fiscal year 2018.

### Statewide debt collection program

#### Metric Definition

The department collects debts owed to state agencies, courts, the Legislature, state authorities and local units of government. The amounts shown include all amounts collected, including the collection fee.

Goal Met	Current	Previous	Target	Trend
✗	\$7.5 million	\$7.0 million	\$37.4 million	↑

**Reporting Cycle:** Quarterly (October 1, 2017 - December 31, 2017)

**Additional Details:** Current reporting period is actual results for Quarter 2 of fiscal year 2018; fiscal year 2017 result is \$29.8 million. Previous reporting period is actual results for Quarter 1 of fiscal year 2018. Target is an annual legislative goal for fiscal year 2018.

### Average processing time for individual income tax returns

#### Metric Definition

The average processing time starts when the department receives an income tax return and ends when the return has posted to the account.

Goal Met	Current	Previous	Target	Trend
✓	5.6 days	5.8 days	8 days	↑

**Reporting Cycle:** Annual (tax processing year)

**Additional Details:** Current reporting period is tax year 2016 returns (reported in November 2017). Previous reporting period is actual results for tax year 2015 returns. Target is for tax year 2016 returns. Returns requiring review and/or additional information may take up to 12 weeks to complete processing. The department balances processing time with protecting taxpayers against fraud. The department seeks to be vigilant in both regards by monitoring our processing time to ensure a lean process that deliver taxpayers returns in a timely fashion. Number of days reported are business days.

### Average processing time for unclaimed property claims

#### Metric Definition

The processing time for this metric begins when the department has received a complete unclaimed property claim with the necessary documents to support the claim.

Goal Met	Current	Previous	Target	Trend
✓	9.3 days	2.1 days	40 days	↓

**Reporting Cycle:** Quarterly (October 1, 2017 - December 31, 2017)

**Additional Details:** Current reporting period is Quarter 2 of fiscal year 2018. Previous reporting period is Quarter 1 of fiscal year 2018. This metric reports on processing time for simple claims (reported owner, business, government, and uniform gifts). Number of days reported are calendar days. Ninety days is the statutory requirement.

## Customer/Taxpayer Satisfaction

Average hold time for customer service call center

### Metric Definition

This is the IS&E Division's average hold time for calls to the customer service call center.

Goal Met	Current	Previous	Target	Trend
✓	20 seconds	20 seconds	90 seconds	↔

**Reporting Cycle:** Quarterly (October 1, 2017 - December 31, 2017)

**Additional Details:** Current reporting period is Quarter 2 of fiscal year 2018. Previous reporting period is Quarter 1 of fiscal year 2018. During the tax season, the hold time for customer calls can be longer than at other times of the year. The department strives to provide taxpayers with prompt service at all times.

Taxpayer survey results

### Metric Definition

The department utilizes surveys to receive feedback from taxpayers. Key survey measures are whether the taxpayer thought the Department of Revenue employee was professional and knowledgeable.

Goal Met	Current	Previous	Target	Trend
✓	99.1%	99.0%	*95%	↑
✓	99.1%	99.0%	**95%	↑

\*Professionalism

\*\*Knowledgeable

**Reporting Cycle:** Quarterly (October 1, 2017 - December 31, 2017)

**Additional Details:** Current reporting period is for Quarter 2 of fiscal year 2018. Previous reporting period is Quarter 1 of fiscal year 2018. The results are from phone surveys in the Customer Service, Compliance, Tax Operations, and Audit Bureaus in the Income, Sales and Excise Tax Division.

## Open and Transparent Government

Total number of public records requests received

**Metric Definition**

Total number of public records requests received.

Current	Previous	Trend
45	43	↑

**Reporting Cycle:** Quarterly (October 1, 2017 - December 31, 2017)

**Additional Details:** Executive Order #235 requires agencies to post public records metrics. Requests may be received verbally or in writing and are logged by the agency when received.

Total number of public records requests completed

**Metric Definition**

Total number of public records requests completed.

Current	Previous	Trend
45	45	↔

**Reporting Cycle:** Quarterly (October 1, 2017 - December 31, 2017)

**Additional Details:** Executive Order #235 requires agencies to post public records metrics. Completed or closed means no further action is required by the agency. Requests completed during this reporting cycle may have been initiated during a previous quarter.

Average time taken to fulfill public records requests

**Metric Definition**

Total time taken (in business days) to fulfill public records requests divided by the total number of public records requests completed in this reporting cycle.

Goal Met	Current	Previous	Target	Trend
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4.6 days

7.7 days

10 days



**Reporting Cycle:** Rolling average updated quarterly (October 1, 2017 - December 31, 2017)

**Additional Details:** Executive Order #235 requires agencies to post public records metrics. This metric includes requests fulfilled this quarter although the requests may have been initiated in a previous quarter. Weekends, legal holidays, time spent waiting for payment of invoices, and time spent waiting for clarification from requestor are not counted in total business days. Requests received and fulfilled within one business day are calculated as zero days. Fulfilled means no further action is required by the agency.

Percentage of public records requests acknowledged within one business day

#### Metric Definition

Percentage of public records requests sent to the agency's primary public requests inbox and acknowledged by the next business day.

Goal Met	Current	Previous	Target	Trend
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65%

47%

100%



**Reporting Cycle:** Quarterly (October 1, 2017 - December 31, 2017)

**Additional Details:** This does not include requests sent via channels other than the primary public requests inbox. Acknowledged is defined as a response sent back to requestor by the next business day. Business days do not include weekends or legal holidays.

Percentage of current employees completing public records training

#### Metric Definition

Percentage of current employees that completed public records training by March 1 of each calendar year.

Goal Met	Current	Previous	Target	Trend
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100%

N/A

100%

N/A

**Reporting Cycle:** Annual (March 1, 2016 - February 28, 2017)

**Additional Details:** Public records training is available to state employees via our enterprise learning management system. All state employees (permanent, project, and limited term) are required to complete this training. This metric is measured annually on March 1 for employees that started before February 1. Data does

not include employees who completed the training, but left employment before the end of the reporting cycle. This is the first reporting cycle. Previous and trend will not be available until the next reporting cycle.

### Percentage of new employees completing public records training

#### Metric Definition

Percentage of new employees that completed public records training within 30 calendar days of their start date.

Goal Met	Current	Previous	Target	Trend
✓	100%	60%	100%	↑

**Reporting Cycle:** Rolling average updated quarterly (April 1, 2017 - June 30, 2017)

**Additional Details:** Public records training is available to state employees via our enterprise learning management system. All new state employees (permanent, project, and limited term) are required to complete the training within 30 calendar days of their start date.

### Percentage of exiting employees that received notice of public records retention obligations

#### Metric Definition

Percentage of exiting employees that received notice of public records retention obligations on or before last day of employment.

Goal Met	Current	Previous	Target	Trend
✓	100%	100%	100%	↔

**Reporting Cycle:** Quarterly (July 1, 2017 - September 30, 2017)

**Additional Details:** It is required that all exiting employees receive notice of public records retention obligations on or before last day of employment.